

## FPR On-screen Help

### FPR Request Screen

This is the Financial Performance Report (FPR) request screen. Please select which type of FPR you would like by clicking on the circle to the left of your choice and then click OK. You will be directed to the appropriate screen to customize your report.

**Report Options:** There are 3 options available to you.

**Option 1 – I want an FPR emailed to me for one credit union.**

Use this option if you want an FPR emailed to you for a single charter. You can determine the cycle date, interval, and data pages that you wish to receive via email. The report reflects the most recent Call Report data that has been collected. Peer ratios are not available for the current cycle until all credit unions have uploaded and the data has been validated. The FPR for a single charter includes prior period peer average ratios for comparative purposes. NCUA will notify users when the peer ratios for the most current cycle are available.

**Option 2 – I want an FPR emailed to me that aggregates data from multiple credit unions based on credit union information.**

Use this option if you want an FPR emailed to you that aggregates multiple credit unions based upon your selection criteria (e.g. region, state, peer group, etc.). The resulting FPR represents the consolidated financial statements and ratios for the group of credit unions selected. This option is available for current cycle reports **after** the Call Report collection/validation process is complete for the cycle. Keep in mind that the ratios in aggregate reports are not average ratios. They are aggregate ratios based upon the consolidated population. For example, the Net Worth ratio on aggregate reports is calculated by totaling the Net Worth dollars for all credit unions in the selected group and then dividing this by the total Assets for the selected group. Peer average ratios and percentile ranks are not available for aggregate FPRs.

**Option 3 – I want to view a 2-page FPR summary for one credit union online.**

Use this option to view the first 2 data pages (Financial Summary and Ratio Analysis) of an FPR for a single charter while you are online. The Financial Summary page is a synopsis of the credit union's financial statements for 5 quarters. The Ratio Analysis page shows the standard ratio page for the FPR for 5 quarters.

**General Information:** Once you receive an email, you may either save the FPR to your hard drive or view the FPR from email. If you want to print the entire report, select "entire workbook" on the print request screen. If you want to print individual pages, select the page range on the print request screen. Peer averages and percentile ranks for the current cycle are available after the Call Report collection/validation process is complete for the cycle. FPRs for single charters include the peer averages and percentile ranks for the prior period.

<b>Option 1</b> – “I want an FPR emailed to me for one credit union”
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**Recipient’s Email:**

Remember to enter the email address where you want the FPR sent in the box marked “Recipients Email.” If the email address is invalid in any way (Example: omitting the @ symbol) you will not receive a report.

**Report Cycle:**

Select the report cycle by clicking on the drop-down arrow and highlighting the cycle date.

**Interval:**

Be sure to select the report cycle date **before** selecting the interval since the interval options vary based upon the report cycle selected. Select quarterly, annual, or semiannual (for June cycles only) - using the appropriate drop down boxes.

**Charter Number:**

Enter the charter number in the “Charter Number” box or use the link “Click here to find Credit Union.”

**Pages to Include in the Report:**

If you want the entire report with all available pages, check the “All Pages” box. To request specific pages, you must remember to uncheck the “All Pages” box and then select the pages you want to receive.

**Submit:**

Remember to click the “Submit” button to register your request. If your request is successful, a screen will appear that indicates “FPR Request Submitted.” Click the back arrow on the browser to return to the previous screen. The system will email you the report as an Excel file attachment within 24 hours of your request (normally this takes less than 1 hour).

**FPR Request Submitted:**

Once you receive the requested FPR you may either save the FPR to your hard drive or view the FPR from email. If you want to print the entire report, select “entire workbook” on the print request screen. If you want to print individual pages, select the page range on the print request screen.

Peer averages and percentile ranks for the current cycle are available after the Call Report collection/validation process is complete for the cycle. FPRs for single charters include the peer averages and percentile ranks for the prior period.

<b>Option 2</b> – “I want an FPR emailed to me that aggregates data from multiple credit unions based on credit union information”
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This is the request screen for an FPR that consolidates data from multiple credit unions based on certain credit union information. This option is available for current cycle reports **after** the Call Report collection/validation process is complete for the cycle. Keep in mind that the ratios in aggregate reports are not average ratios. They are aggregate ratios based upon the consolidated population. For example, the Net Worth ratio on aggregate reports is calculated by totaling the Net Worth dollars for all credit unions in the selected group and then dividing this by the total Assets for the selected group. Peer average ratios and percentile ranks are not available for aggregate FPRs.

**Recipient’s Email:**

Remember to enter the email address where you want the FPR sent in the box marked “Recipients Email.” If the email address is invalid in any way (Example: omitting the @ symbol) you will not receive a report.

**Report Cycle:**

Select the report cycle by clicking on the drop-down arrow and highlighting the cycle date.

**Interval:**

Be sure to select the report cycle date **before** selecting the interval since the interval options vary based upon the report cycle selected. Select quarterly, annual, or semiannual (for June cycles only) - using the appropriate drop down boxes.

**Select Criteria:**

Use the drop down menus to select the criteria for the group of credit unions you want to include in your aggregate FPR. To include all credit unions in your report, leave the Region, State, TOM (Type of Membership) Code, or Peer Group blank. For example, if you leave the Region field blank, your aggregate FPR will include all regions.

**Credit Union Types to Include in the Report:**

Remember to check FCUs and/or FISCUs to determine which types of credit unions you wish to include in your report. If you do not check either box, the report will include both Type 1 and 2 credit unions (or all Federally Insured Credit Unions) in your report.

**Limited Income Only:**

If you want the report to include only credit unions that are designated Limited Income, select “Yes.” The default (“No”) includes all credit unions, regardless of Limited Income designation.

**Pages to Include in the Report:**

If you want the entire report with all available pages, check the “All Pages” box. To request specific pages, you must remember to uncheck the “All Pages” box and then select the pages you want to receive.

**Retroactive Population**

If you wish to compare the same set of credit unions for each cycle on the FPR, check the “Retroactive Population” box. For example, if you select “Retroactive Population” for an aggregate FPR for all credit unions in Peer group 6 and there are currently 300 credit unions that meet this criteria, the FPR aggregates the same 300 credit unions for each cycle (assuming they were active as of that cycle date) regardless of their asset size in the prior cycles.

**Submit:**

Remember to click the “Submit” button to register your request. If your request is successful, a screen will appear that indicates “FPR Request Submitted.” You can click the back arrow on the browser to return to the previous screen. The system will send you the requested report as an Excel attachment to an email within 24 hours of your request (normally this takes less than 1 hour).

**FPR Request Submitted:**

Once you receive the requested FPR you may either save the FPR to your hard drive or view the FPR from email. If you want to print the entire report, select “entire workbook” on the print request screen. If you want to print individual pages, select the page range on the print request screen.

Peer averages and percentile ranks for the current cycle are available after the Call Report collection/validation process is complete for the cycle. FPRs for single charters include the peer averages and percentile ranks for the prior period. Peer average ratios and percentile ranks are not available for aggregate FPRs.

<b>Option 3 – “I want to view a 2-page FPR summary for one credit union online.”</b>
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**Report Cycle:**

Select the report cycle by clicking on the drop-down arrow and highlighting the cycle date.

**Charter Number:**

Enter the charter number in the “Charter Number” box or use the link “Click here to find Credit Union.”

Click on “**Financial Summary**” to immediately view a synopsis of the credit union’s balance sheet and income statement.

Click on “**Ratio Analysis**” to immediately view the standard set of FPR ratios for the credit union. Peer average ratios for the current Call Report cycle are not available until all data for the cycle has been collected and validated. NCUA will notify users when the peer ratios are available for the current cycle.

Use the print command to print the FPR. The online FPR cannot be downloaded; however, you can copy and paste the data into an Excel spreadsheet by doing the following:

1. Place your cursor anywhere in the data page, right click and chose “Select All” to highlight the entire page.
2. With the data highlighted, right click again and chose “Copy.”
3. Open an empty Excel spreadsheet and from the toolbar choose Edit and Paste to copy the data into your spreadsheet.